

## Company Correspondence

Correspondence is the central area where all notes associated with a company can be accessed by all employees. You can add, view and report on all communication like phone calls, conversations, emails, etc. To add a correspondence, search the Company using your preferred search method.

There are two (2) ways to add a Correspondence note to the Company from Restoration Manager.

### Correspondence Tab

**Note:** The number in parentheses is the total amount of Correspondence records that are associated or linked to the Company.

To add a new Correspondence, click the **plus** icon.



**Jacksonville Property Mgmt**  
**Jacksonville Property Mgmt**  
 2369 1st Street, Suite 300, Jacksonville Beach, FL 32250

Type:  Status:  By:

Search:

When	Type	Subject	Initiate	With	Status	Task	By	Link	Job #
10/27/2019 06:19 PM	Email	Completed Task - Follow-up Visit Emailed Successfully	To	dbryant@verisk.com	Complete	Yes	Dawn Bryant		
10/27/2019 06:17 PM	Email	Completed Task - Follow-up Visit Emailed Successfully	To	dbryant@verisk.com		No	Dawn Bryant		
10/21/2019 09:22 AM	Client Breakfast	Panera	To	Alisha Kurt		No	Dawn Bryant		
10/21/2019 09:13 AM	Client Breakfast	Cracker Barrel	To	Michael Jasper		No	Dawn Bryant		
10/12/2019 02:52 PM	Event	Breast Cancer Event	To	Michael Jasper		No	Dawn Bryant		
09/04/2019 02:22 PM	Client Lunch	Olive Garden	To	Alisha Kurt		No	Dawn Bryant		
08/06/2019 02:51 PM	Office Visit	Scheduled Visit	To	Michael Jasper		No	Dawn Bryant		
05/01/2019 02:40 PM	Client Lunch	McDonalds	To	Michael Jasper		No	Dawn Bryant		

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Item 1 to 8 of 9

Email Contact:  Text Contact:



Type:  Date:  Time:  Progress:

To:  With:

Subject:

Picked up Donuts, Coffee and Cider surprised the office this morning. Everyone RAVED over the donuts they were still warm. :)

Receipt #:  Amount Spent:

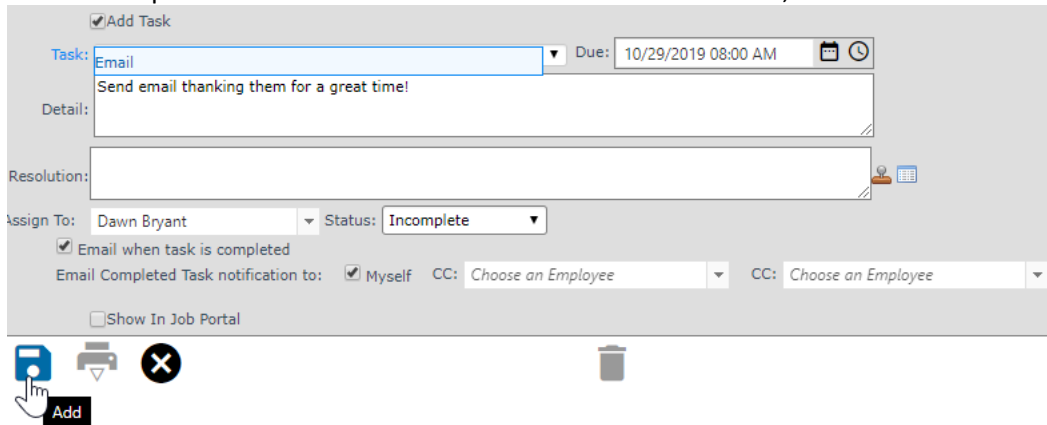
Add Task  
 Show In Job Portal



## Company Correspondence

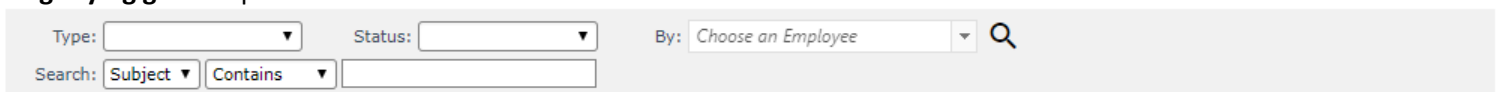
1. Select the **Type** of Correspondence from the drop-down. *(required) \*searchable and appears in reports*
2. The **Date and Time** fields default to the current date & time the record was opened.
3. Select the **Progress** from the drop down *(if applicable)*
4. **To** (the person the correspondence was to) or **From** (the person the correspondence was from). *\*appears in reports*
5. The **With** drop-down contains all contact names associated with the Company. You can select from the drop-down or type in the field. *\*searchable and appears in reports*
6. Add the **Subject** that best describes the correspondence you are entering. *(required) \*searchable and appears in reports*
7. Add the Details of the correspondence within the **Detail** box. *\*appears in reports*
8. Add the **Receipt #** *(if applicable) \*appears in reports*
9. Add the **Amount Spent** *(if applicable) \*appears in reports*
10. When you are finished Click **Add**.

If the correspondence is unresolved and needs further resolution, check the **Add Task** box.



1. Apply the **Task** you can select from the drop-down or manually add the subject. *(required)*
2. Adjust **Due** (date & time) by default it's the current date/time.
3. Add the **Detail** of the task you would like to have addressed.
4. **Assign To** field assign the Task to the person that is responsible to complete the Task. By default, this field populates the name of the person logged in. You can change the assignee by highlighting the name then begin typing who the task will be assigned to.
5. **Email when task is completed**; check this box if you would like to receive an email when the assignee has completed the Task. You can also CC two other individuals to receive the completed task email.
6. When you are finished click **Add**.

The correspondence search provides the ability to narrow down correspondence activities associated with a Company by using any of the filters. **Type:** *Type of correspondence*, **Status:** *Incomplete or Complete Task*, **By:** *Who entered the correspondence*, **Subject:** *description of the correspondence*, and **With:** *Who the correspondence was with*. Click the **magnifying glass** to proceed.



## Company Correspondence

### Quick Add

Within the Contacts tab in the Correspondence column single click the + icon to quick add a Correspondence.

<span>Detail</span> <span>Contacts (6)</span> <span>Work Order Setup</span> <span>Subs/Techs</span> <span>Tasks (4)</span> <span>Correspondence (10)</span> <span>Documents &amp; Pics (3)</span> <span>Locations (2)</span> <span>Referrals</span>											
<span>Affiliations</span> <span>Compliance Templates (BETA)</span>											
Last Name	First Name	Primary	Secondary	Title	Phone 1	Phone 2	Phone 3	Task	Correspondence	Status	
Property Mgmt	Jacksonville	Yes	No					+	+	Active	
Atten: Accounts Payable		No	No					+	+	Active	
Jasper	Michael	No	No	Property Manager	904-000-0000 - Cell			+	+	Active	
Jaxson	Hunter	No	No	Property Manager	904-000-1111 - Cell			+	+	Active	
Kurt	Alisha	No	No	Property Manager	904-000-0000 - Main			+	+	Active	
Levenger	Maxwell	No	No	Adjuster	904-111-2222 - Cell			+	+	Active	

The page will redirect and open the new Correspondence for that contact.

**Note:** "Type" will default to Note we recommend changing the type to further define the type of correspondence you are recording. Also the "With" field will pre-populate with the contact you selected to quick add a correspondence against. Please refer back to pages 1 & 2 for a description how to add the Correspondence.

Tasks and Correspondence

Correspondence | Tasks

Type:  Status:  By:

Search:

When	Type	Subject	Initiate	With	Status	Task	By	Link	Job #
No records to display.									

Type:  Date:  Time:  Progress:


To:  With:

Subject:

Detail:

Receipt #:  Amount Spent:

Add Task  Show In Job Portal

General Information	Sales Information
<input type="checkbox"/> Primary Contact <input type="checkbox"/> Secondary Contact <input type="checkbox"/> My Contact First: <input type="text"/> MI: <input type="text"/> Last: <input type="text"/> Title: <input type="text"/>	



## Company Correspondence

### Emailing from Correspondence

To email from correspondence single click the **Correspondence Tab**. From the **Email Contact** drop-down select the Contact you would like to send an email to.

*Note: The contact will only appear in the drop down if they have an email address associated with their contact record.*



**Jacksonville Property Mgmt**  
**Jacksonville Property Mgmt**  
2369 1st Street, Suite 300, , Jacksonville Beach, FL 32250

Type:  Status:  By:

Search:

When	Type	Subject	Initiate	With
10/27/2019 06:19 PM	Email	Completed Task - Follow-up Visit Emailed Successfully	To	dbryant@verisk.com
10/27/2019 06:17 PM	Email	Completed Task - Follow-up Visit Emailed Successfully	To	dbryant@verisk.com
10/27/2019 07:30 AM	Coffee/Donu	Apple Orchard	To	Jacksonville Property Mgmt
10/21/2019 09:22 AM	Client Breakfast	Panera	To	Alisha Kurt
10/21/2019 09:13 AM	Client Breakfast	Cracker Barrel	To	Michael Jasper
10/12/2019 02:52 PM	Event	Breast Cancer Event	To	Michael Jasper
09/04/2019 02:22 PM	Client Lunch	Olive Garden	To	Alisha Kurt
08/06/2019 02:51 PM	Office Visit	Scheduled Visit	To	Michael Jasper

Page:  of   Page size:

Email Contact:  Text Contact:



- Alisha Kurt
- Hunter Jaxson
- Maxwell Levensger
- Michael Jasper**

## Company Correspondence

After selecting the contact from the drop-down menu, you will be redirected to the Build Email page.

**Build Email** Total Attachment Size: 0KB (0MB)

**Company Information:**  
 Name: Jacksonville Property Mgmt - , Contact: Jacksonville Property Mgmt -

Show in Portal

Template:

Company & Office related merge fields are available.


To:  Michael Jasper

CC:

CC (contacts):

- Alisha Kurt
- Hunter Jaxson
- Maxwell Levenger
- Michael Jasper

Subject:  Send in Text format

Attachment(s): 

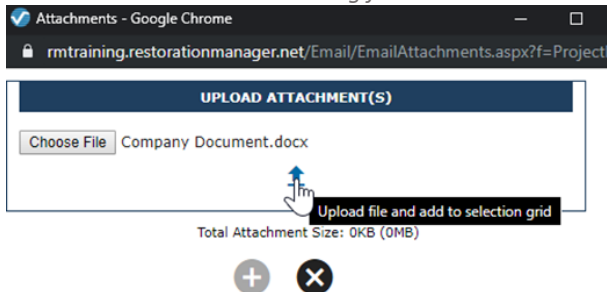
The recipients email address will appear in the **To** field.

1. Check **Show in Portal** if you would like this email to be viewable by the contact within the Company Portal.
2. Select a **Template** from the drop-down menu (*if applicable*) When an email template is selected the subject defaults to the template name and the body of the email is populated.  
*Note: The Administrator of the application can create email templates by going to Settings→ Office Setup→ Email Templates. Please refer to the **Email Template – Setup** reference document on the University under **Training Documents** → **Administrator***
3. The **To** field is the recipient of the email.
4. You can manually add an email address into the **CC** field. If more than one email is added the email addresses need to be separated by a semi colon or comma.
5. Within **CC (contacts)** if you would like to include additional contacts on the email check the box next to their name.
6. Apply the **Subject** of the email.
7. By single clicking on the **Attachments** icon you can upload documents and/or pictures.
8. Type a message within the **body of the email**; if an email template wasn't selected.
9. Selecting **Preview**, to preview the email prior to sending the page opens in a pop-up window.
10. When you are finished click **Send Message**.
11. After the email is sent the page redirects back to the Correspondence page.

### Email Attachments Usage

By single clicking on the **Attachments** a pop-up dialog box is displayed. Select **Choose File** to browse to where the file is stored, select the file you want to attach to the email. When you are finished select Upload files.

*Note: The limitation to attaching files is 10mb*



## Company Correspondence

### Email Templates

Select the Template from the drop-down menu

Total Attachment Size: 0KB (0MB)

**Build Email**

**Company Information:**  
Name: Jacksonville Property Mgmt - , Contact: Jacksonville Property Mgmt -

Show in Portal

**Template:** Business Development Introduction Letter from Restoration Manager

**To:** \*End Date Request for Job: [Job ID] - [Primary Contact Full Name]

**CC:** [Job ID], Adjuster Progress Report for [Primary Contact Full Name]

**CC (contacts):** [Job ID], Customer Progress Update: [Primary Contact Full Name] - [List Type]

[Job ID], Employee Transition for [Primary Contact Full Name]

[Job ID], Estimate Completed Update - [Address Full]

**Subject:** [Job ID], Information needed for [Primary Contact Full Name]

**Attachment(s):** [Job ID], Letter for Pre-Completion of Work for [Primary Contact Full Name]

[Job ID], Request Invoicing

[Vendor Name] Work Order \*\*\*SCHEDULED REMINDER\*\*\*

[Vendor Name] Work Order \*\*\*SCHEDULED\*\*\*

48 Hour Update - Estimate Approval Pending: [Job Name] - [List Type] - [Job ID]

**Business Development Introduction Letter from Restoration Manager**

Certificate of Completion and Payment

Dawn's Email Signature

Estimate Approval Requested: [Primary Contact First Name]

IMPORTANT: Sub/Tech Portal Letter

Invoice

Job Call Sheet: [Primary Contact Full Name] - [Job ID] - [List Type]

Job Information: [Primary Contact Full Name] - [Job ID] - [List Type]

Greetings from Restoration Manager

I am very excited to introduce my services for your business purpose. As property as our own. We are genuinely throughout the state, we can provide fa

We are fully equipped for every emergency to assess the damage and take steps to prevent further damage. As a licensed general contractor and expert in wind, fire, smoke, water, and mold damage restoration, our full restoration services includes:

Michael Jasper

Send in Text format

\*In addition to CC

Restoration Manager

and understand the important role of emergency greater Southwest region and treat your vice. With four convenient locations

our professional staff will take immediate action

Before sending the email, it can be previewed and checked for accuracy by selecting **Preview** at the bottom of the page.



When selecting the **Preview**, the page opens in a pop-up window and all the merge fields are populated.

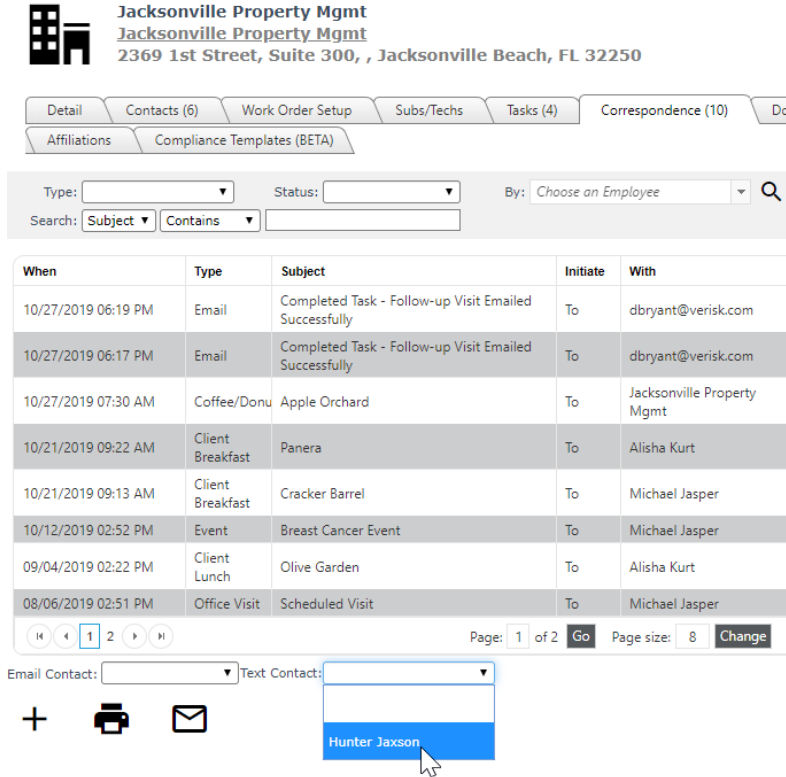
*Reminder: Please ensure that pop-up blockers have been allowed for Restoration Manager within the browser of your choice.*

## Company Correspondence

### Sending a Text from Correspondence

To send a Text from correspondence click on the **Correspondence Tab**. Select the contact you from the **Text Contact** drop-down menu.

*Note: The contact will only appear in the drop down if the SMS/Text is associated with their contact record.*



**Jacksonville Property Mgmt**  
**Jacksonville Property Mgmt**  
 2369 1st Street, Suite 300, , Jacksonville Beach, FL 32250

Detail | Contacts (6) | Work Order Setup | Subs/Techs | Tasks (4) | Correspondence (10) | Do

Affiliations | Compliance Templates (BETA)

Type: [ ] Status: [ ] By: Choose an Employee [ ] Q

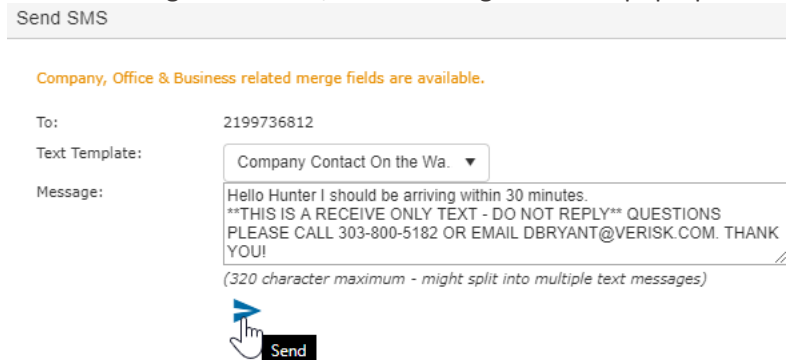
Search: Subject [ ] Contains [ ] [ ]

When	Type	Subject	Initiate	With
10/27/2019 06:19 PM	Email	Completed Task - Follow-up Visit Emailed Successfully	To	dbryant@verisk.com
10/27/2019 06:17 PM	Email	Completed Task - Follow-up Visit Emailed Successfully	To	dbryant@verisk.com
10/27/2019 07:30 AM	Coffee/Donu	Apple Orchard	To	Jacksonville Property Mgmt
10/21/2019 09:22 AM	Client Breakfast	Panera	To	Alisha Kurt
10/21/2019 09:13 AM	Client Breakfast	Cracker Barrel	To	Michael Jasper
10/12/2019 02:52 PM	Event	Breast Cancer Event	To	Michael Jasper
09/04/2019 02:22 PM	Client Lunch	Olive Garden	To	Alisha Kurt
08/06/2019 02:51 PM	Office Visit	Scheduled Visit	To	Michael Jasper

Page: 1 of 2 Go Page size: 8 Change

Email Contact: [ ] Text Contact: [ Hunter Jaxson ]

After selecting the contact, the following Send SMS pop-up will display.



Send SMS

Company, Office & Business related merge fields are available.

To: 2199736812

Text Template: Company Contact On the Wa. [ ]

Message: Hello Hunter I should be arriving within 30 minutes.  
 \*\*THIS IS A RECEIVE ONLY TEXT - DO NOT REPLY\*\* QUESTIONS  
 PLEASE CALL 303-800-5182 OR EMAIL DBRYANT@VERISK.COM. THANK YOU!  
 (320 character maximum - might split into multiple text messages)

Send

1. **To;** displays the recipient's mobile number.
2. Select a **Text Template** from the drop-down. *(if applicable)*  
*Note: The Administrator of the application can create text templates by going to Settings→ Office Setup→ Text Templates. Please refer to the **Text Template – Setup** reference document on the University under **Training Documents** → **Administrator***
3. Manually apply your **Message**.
4. When you are finished click **Send**.



## Company Correspondence

### How the correspondence displays after the Text is sent



**Jacksonville Property Mgmt**  
**Jacksonville Property Mgmt**  
2369 1st Street, Suite 300, , Jacksonville Beach, FL 32250

[Detail](#)
[Contacts \(6\)](#)
[Work Order Setup](#)
[Subs/Techs](#)
[Tasks \(4\)](#)
[Correspondence \(11\)](#)
[Documents & Pics \(3\)](#)
[Locations \(2\)](#)
[Referrals](#)

[Affiliations](#)
[Compliance Templates \(BETA\)](#)

Type:  Status:  By:

Search:

When	Type	Subject	Initiate	With	Status	Task	By	Link	Job #
10/27/2019 11:23 PM	Text	Text Message Sent	To	Hunter Jaxson (2199736812@messaging.:		No	Dawn Bryant		

Type:  Date:  Time:  Progress:

To:

Subject:

Detail:

Hello Hunter I should be arriving within 30 minutes.  
 \*\*THIS IS A RECEIVE ONLY TEXT - DO NOT REPLY\*\* QUESTIONS PLEASE CALL 303-800-5182 OR EMAIL DBRYANT@VERISK.COM. THANK YOU!

Receipt #:  Amount Spent:

Add Task  
 Show In Job Portal

At the bottom of the Correspondence page is a **Printer** icon, click this icon to print the Correspondence Summary Report.



**Jacksonville Property Mgmt**  
**Jacksonville Property Mgmt**  
2369 1st Street, Suite 300, , Jacksonville Beach, FL 32250

[Detail](#)
[Contacts \(6\)](#)
[Work Order Setup](#)
[Subs/Techs](#)
[Tasks \(4\)](#)
[Correspondence \(11\)](#)
[Documents & Pics \(3\)](#)
[Locations \(2\)](#)
[Referrals](#)

[Affiliations](#)
[Compliance Templates \(BETA\)](#)

Type:  Status:  By:

Search:

When	Type	Subject	Initiate	With	Status	Task	By	Link	Job #
10/27/2019 11:23 PM	Text	Text Message Sent	To	Hunter Jaxson (2199736812@messaging.:		No	Dawn Bryant		
10/27/2019 06:19 PM	Email	Completed Task - Follow-up Visit Emailed Successfully	To	dbryant@verisk.com	Complete	Yes	Dawn Bryant		
10/27/2019 06:17 PM	Email	Completed Task - Follow-up Visit Emailed Successfully	To	dbryant@verisk.com		No	Dawn Bryant		
10/27/2019 07:30 AM	Coffee/Dono	Apple Orchard	To	Jacksonville Property Mgmt	Incomplet	Yes	Dawn Bryant		
10/21/2019 09:22 AM	Client Breakfast	Panera	To	Alisha Kurt		No	Dawn Bryant		
10/21/2019 09:13 AM	Client Breakfast	Cracker Barrel	To	Michael Jasper		No	Dawn Bryant		
10/12/2019 02:52 PM	Event	Breast Cancer Event	To	Michael Jasper		No	Dawn Bryant		
09/04/2019 02:22 PM	Client Lunch	Olive Garden	To	Alisha Kurt		No	Dawn Bryant		

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Email Contact:  Text Contact:







## Company Correspondence

### Correspondence Summary Report – Sample

RM Restoration  
7991 Shaffer Parkway, Suite 300  
St. Petersburg, FL 32250  
Office: (303) 800-5182



### Correspondence

10/27/2019

For All Dates

Company	Company Code	Contact	Phone 1	Phone 2	
Jacksonville Property Mgmt		Jacksonville Property Mgmt			
Date/Time	Type	Subject	With	By	Progress
10/27/2019	Text	Text Message Sent	To: Hunter Jaxson (2199736812@messaging.sprintpcs.com)	Dawn Bryant	Complete
Hello Hunter I should be arriving within 30 minutes. **THIS IS A RECEIVE ONLY TEXT - DO NOT REPLY** QUESTIONS PLEASE CALL 303-800-5182 OR EMAIL DBRYANT@VERISK.COM. THANK YOU!					
10/27/2019	Email	Completed Task - Follow-up Visit Emailed Successfully	To: dbryant@verisk.com	Dawn Bryant	
Assigned To: Dawn Bryant					
Completed By: Dawn Bryant					
Due Date: 9/25/2019 11:00:00 AM					
Company Name: Jacksonville Property Mgmt					
Company Contact: Jacksonville Property Mgmt					
Subject: Follow-up Visit					
Detail: Schedule Visit					
Resolution: Visit Scheduled, the task was overdue due to Michael being out of town.					
<b>Follow Up</b>		<b>By:</b> Dawn Bryant	<b>Due:</b> 09/25/2019		
<b>Resolution:</b>		<b>Status:</b> Complete			
Visit Scheduled, the task was overdue due to Michael being out of town.					
10/27/2019	Email	Completed Task - Follow-up Visit Emailed Successfully	To: dbryant@verisk.com	Dawn Bryant	
Assigned To: Dawn Bryant					
Completed By: Dawn Bryant					
Due Date: 9/25/2019 2:22:00 PM					